

Overview

The Bryan-College Station Convention and Visitors Bureau contracted Randall Travel Marketing to conduct a comprehensive study including visitor research and strategic planning. The study was conducted September 2000 through March 2001. The primary elements of this study included:

1. Initial Meeting and materials gathering:

Initial meetings were conducted between Bryan-College Station CVB officials and Randall Travel Marketing (RTM) professionals in order to review questionnaire instruments, gather input, marketing materials, marketing plans, etc.

2. Reconnaissance Trip:

Judy L. Randall and Dr. Larry Gustke visited the Bryan-College Station area in October 2000 and fully evaluated the site from the perspective of the tourist. Additionally, Luke Hodges conducted follow-up reconnaissance trips during late November-early December 2000 and in March of 2001. Berkeley Young visited the area to interview the BCSCVB staff and observe holiday visitation patterns in late December 2000. The findings from the reconnaissance teams are documented in this report.

3. Visitor Profile & Conversion Survey – Random Sample of Inquiries:

1,000 4-page questionnaires were mailed out to a scientifically determined random sample of people who had requested visitor information from the Bryan-College Station CVB over the course of a one-year period. 197 surveys were returned for a 19.70% return rate and have been tabulated as part of this report. It should be noted that the standard return rate expected in the travel and tourism industry is approximately 10%. Thus, this return rate is an excellent response. Additionally, our team noted a consistent homogenous quality to the responses that further elevates our confidence in the responses.

4. Visitor Profile & Conversion Survey – Intercepts:

Over 50 intercept interviews were conducted with lodging guests in the Bryan-College Station area. The purpose of these intercept interviews was to ensure that the responses to the mail survey (sent to those who had made inquiries to the CVB) matched actual overall visitation patterns of those who stay in the lodging properties. The findings and results of these interviews have been tabulated as part of this report.

5. Executive Interviews

A listing of community leaders was prepared with input from the Bryan-College Station CVB officials. Over 30 interviews were conducted in person or by telephone with these targeted opinion leaders. Anonymity was guaranteed for each interview. The summary of the responses is a part of this study.

6. Transit Intercept Interviews

Intercept interviews were conducted with travelers found in the Bryan-College Station area during the several reconnaissance and interview trips. This included intercept interviews conducted at the airport, attractions and highway pull-off locations. Findings from these interviews are included in both the reconnaissance and in the intercept interview segments.

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- 7. Lodging Property Interviews and Fax Survey:**
Additionally, every lodging property in Bryan-College Station was contacted. General Managers from a random sample of properties were interviewed. Additionally a fax survey was sent to every property. The response rate to this fax survey was 84.66%. This information has been tabulated as part of this report.
- 8. State, Regional and National Data:**
Research data from the State of Texas was obtained and analyzed as part of the study. Additionally, regional and national databases were studied for travel and behavior patterns.
- 9. Marketing Materials Evaluation:**
Marketing materials including brochures, fulfillment pieces, press kits and coverage, print advertising and placement schedules, etc., were obtained from the Bryan-College Station CVB. Those materials were evaluated based on research findings and the marketing experience of the RTM team. Our analysis and recommendations are a part of this report.
- 10. Report and Recommendations:**
Based on research findings a comprehensive report was written and presented to the Bryan-College Station CVB.

Summary of Research Findings and Recommendations

1. *Visitors to Bryan-College Station rate their overall trip satisfaction 4.3 on a 1-5 scale (where 1 is low and 5 is high) and clearly appreciate the area.*
2. *The vast majority of visitors and opinion leaders feel that the two cities should be marketed as one destination.*
3. *What visitors like most about Bryan-College Station includes:*
 - *Texas A&M University*
 - *The George Bush Presidential Library*
 - *Historic Downtown Bryan*
 - *Restaurants**The top dislikes for visitors include:*
 - *Traffic*
 - *Way finding*
4. *Visitors are significantly more likely to travel to Bryan-College Station by automobile than by any other mode of transportation (approximately 88%).*
5. *Point of origin for most visitors in Texas (Waco, Dallas-Fort Worth, Abilene, Houston, San Antonio, Austin).*
6. *The majority of visitors had visited Bryan-College Station previously (approximately 66%).*
7. *The primary trip purposes for visitors include visiting friends & relatives, attending football games, TAMU-related, business, sports, and getaways.*
8. *The typical travel party consists primarily of adults (approximately 68%). The average age is 48 years.*
9. *The typical length of stay in Bryan-College Station is 0-3 days.*

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- 11. The primary sources for trip planning information (other than those who reported “already knew”) include:
 - Newspaper travel features
 - Texas Highways
 - Bryan-College Station web site
 - Texas State Travel Guide
 - Texas travel web site
 - Southern Living
 - Bryan-College Station Visitor Guide
- 12. The conversion rate for the Bryan-College Station CVB marketing program is 53.08%. This is an excellent rate compared to other destinations.
- 13. The activities that most visitors enjoy while in Bryan-College Station include:
 - Shopping
 - Driving/sightseeing
 - Visit Presidential Library
 - Visit TAMU
 - Walking downtown
- 14. The specific attractions and sites most visited and appreciated in Bryan-College Station include:
 - Texas A&M University
 - The George Bush Presidential Library
 - Historic Downtown Bryan
- 15. The new tourism products most requested by visitors to Bryan-College Station include:
 - An aquarium
 - Fine dining restaurants
 - A botanical garden
 - Exotic animal park
 - “Spirit of Aggie land” Festival (music, food, arts & crafts)
- 16. Visitors to Bryan-College Station create strong economic impact for the community. This is reflected in the average trip expenditures reported by each segment.

Average Daily Trip Expenditures

<u>Category</u>	<u>Amount</u>	<u>% of Total</u>
1. Lodging	\$73.20	28.33%
2. Shopping	\$61.58	23.83%
3. Transportation (fuel, airfare, etc.)	\$49.87	19.30%
4. Food/meals	\$42.75	16.54%
5. Attractions/amusements	<u>\$31.03</u>	<u>12.01%</u>
Average Daily Expense	\$258.42	100.00%



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- 17. Spring and autumn are the most heavily visited times.*
- 18. Visitors enjoy Bryan-College Station and nearly 66% plan to visit again. They show interest in returning all months, with slightly less interest in winter.*
- 19. The average age of visitors to Bryan-College Station is 48 years. They are educated with the majority having some college, a college degree or advanced degree. The trip planner tends to be the female head of household. The income level is in the middle range.*

Strategic Direction

RTM recommends a strategic marketing direction for the Bryan-College Station Convention and Visitors Bureau that includes:

- A. *Continue to market the two cities as one destination: Bryan-College Station, Texas.* Based on research completed in this study, the overwhelming consensus is that the two cities should continue to market as one destination. Duplicate marketing efforts are seen as inefficient and perhaps even confusing as both would need to market the same primary “attractors” and supply the same information to visitors.
- B. *Revamp the Convention and Visitors Bureau:*
 - 1. Consider moving the Visitor Center to a more prominent location for visitor interception, and consider adding satellite offices or kiosks. It is critical that a more compelling orientation be provided to existing visitors, as well as more focus on “extending the stay” and converting first-time visitors into repeat visitors. Better facilitation of the existing visitor market is the goal.
 - 2. If Visitor Center cannot be moved, enhance the exterior appeal of the current Visitor Center and improve signage. Also, it is critical that the Visitor Center be open on weekends to meet the needs of the majority of visitors.
 - 3. Continue for the time-being with the CVB as a part of the Chamber of Commerce. However, establish a strong board of advisors comprised primarily of travel industry related stakeholders such as hoteliers, attractions, and TAMU representatives. Continue funding as it currently exists.
 - 4. Bring the Sports Foundation under CVB direction to market sports as part of the overall marketing effort for the destination, thus creating overall efficiency.
 - 5. Consider making the CVB independent from the Chamber within the next five years. With the other strategic recommendations RTM is making in this report, this would be too much to accomplish initially. However, for long-term success it will be more effective for the CVB to be a free-standing organization with its own board of directors and a continued focus on marketing and providing leadership in future product development.
- C. *Strengthen the relationship between the BCSCVB and TAMU:* This is a critical necessity. We’ve learned clearly in this study that TAMU drives the majority of visitation to the Bryan-College Station area. Thus, it is critical for a strong working relationship between the two organizations. Seek an official TAMU representative who will represent the University’s interests on the CVB board of advisors.

- D. Create a master calendar which allows the CVB and its marketing partners to clearly understand use of existing and planned facilities:* In order to effectively grow tourism revenues in Bryan-College Station, a master calendar of activities must be created that incorporates TAMU activities, sports activities, and the CVB recruited meetings, etc. The marketing partners in this destination need a clear understanding of planned bookings of facilities to be able to “fill in the holes” and book remaining facilities.
- E. CVB needs to create a strong annual plan of work that is shared with its marketing partners:*
1. The CVB needs a strong annual plan that focuses on specific goals for growth in tourism revenues, as well as results measures. At the end of each fiscal year the accomplished results need to be shared with the community to ensure understanding of the CVB's work plan and effectiveness. It is also recommended that a monthly report be provided to marketing constituencies that tracks monthly activities and results, with comparisons to previous years efforts.
 2. It is recommended that this annual plan include a direct sales matrix that targets specific niche markets with realistic outreach objectives and methods. The CVB's marketing constituencies (hotels, attractions, TAMU, etc.) need to be enrolled in partnering with the CVB to accomplish this matrix approach. The CVB does not have the resources to target all possible niche markets. The priorities for the annual direct sales matrix effort need to be shared with the marketing partners, their input sought and all conflicts resolved to allow for a united approach that will earn the best results.
- F. Establish research-based positioning that promotes the most compelling “attractors” or those attractions that drive visitation.* Visitors love the Bryan-College Station area. They also clearly report the top attractions as being TAMU, The Bush Presidential Library and Historic Downtown Bryan. They enjoy staying in Bryan-College Station for shopping, dining and access to these attractors. Together these need to form the positioning or branding foundation upon which marketing efforts are based. All marketing materials need to focus on the primary attractors, their linkage and engage the visitor in trip planning. Items such as excellent maps, suggested itineraries and accurate, detailed information on attractions and amenities are required. Additionally, more focus needs to be placed on extend the stay strategies and tactics such as in-room promotional pieces for business and leisure lodging guests and pre-arrival mailings for convention attendees to help in increasing economic impact.

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- G. Support development of new convention center with adjoining lodging for increased revenues.* Bryan-College Station is currently limited in the markets it is able to attract by lack of preferred convention and meeting facilities with adjoining lodging. Development of a new convention and lodging facility should be supported, as it will significantly grow revenues. The CVB needs to be proactive in working with this new facility in recruitment of potential meeting planners.
- H. New “attractors” are needed to extend visitor stays.* Research conducted in this study has identified potential new tourism products that are most likely to be successful. The CVB and its advisory board need to provide community leadership in driving development of these new attractions. Specifically these include an aquarium, fine dining options, a botanical garden, an exotic animal park, and a festival focused on the “spirit of Aggie Land” with food, music and crafts.

Recommended Positioning Strategy

Bryan-College Station’s current positioning is “Howdy.” The CVB also uses the “Smack In The Heart of Texas” positioning. Research and numerous interviews with both locals and visitors document that “Howdy” is a term that works with this destination. Similarly, research confirms that the primary attractors to the area include TAMU, The Bush Presidential Library, and Historic Downtown Bryan. Thus, these are the positioning elements most important to visitors.

RTM recommends more clearly defining the total appeal visitors find in the Bryan-College Station area.

Additionally, this research report confirms that the average stay in Bryan-College Station is 0-3 nights. The typical travel party is comprised of adults. Approximately two thirds (68%) of the parties who stay overnight are adults traveling without children and approximately one-third (32.31%) do have children. Therefore, a positioning statement is needed that appeals primarily to adults traveling without children, but also incorporates vacationing families.

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The positioning statement Randall Travel Marketing recommends for increasing tourism in Bryan-College Station is:

Howdy!

The history and genuine unforgettable spirit of Aggie Land

Visit the legendary Texas Towns that are home to Texas A&M, The Bush Presidential Library, Historic downtown Bryan, and more Texas-style fun.

Bryan-College Station, Texas

(Additional line of copy where appropriate)

**In Aggie Land, “Howdy” is more than a greeting –
it’s a genuine spirit no one forgets.**

This positioning statement captures the essence of travel to Bryan-College Station. It combines a top message visitors respond to (“Howdy”) with the documented primary attractors for the area (TAMU, The Bush Presidential Library, Historic Downtown Bryan). It clearly focuses primarily on the top “attractors” that will drive visitation. It works for adults traveling without children and for families. It is believable and motivational. Most importantly, it also slightly broadens the appeal from the previously used positioning statement. It is not enough for people to simply know about Bryan-College Station. We must sell the fact that this is an appealing area with *entertaining things to see and do*.

This positioning statement would be used in all promotional efforts. This would be used on the front of the primary marketing brochure, print ads, web site and other marketing outreach materials.

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As documented in research, the Bryan-College Station area appeals strongly to its current markets. There is a love and devotion to the area evidenced by frequent repeat visitation and in significant part generated by the strong connection with Texas A&M University. The Bryan-College Station Convention and Visitors Bureau has done a good job in promotion and conversion of visitor inquiries. This is evidenced in both the high conversion ratio (53.08%) and a high visit satisfaction rating (A grade) visitors report.

We have learned quantifiably in this study that the primary driver of visitation to the Bryan-College Station area is Texas A&M University (TAMU). We've also learned that the primary "attractors" include TAMU, The Bush Presidential Library, and Downtown Historic Bryan.

The report also documents that the area is experiencing a sound volume of visitor expenditures. RTM was particularly pleased to note the relatively high volume of retail spending in ratio to other visitor expenditure categories. The definition of tourism economic impact is "putting visitors in front of cash registers." Bryan-College Station, has accomplished admirable results in achieving the goal of ideal visitor expenditure in comparison to the State of Texas visitation patterns and national averages. Also, an excellent opportunity exists to increase the revenues generated by tourism, while not overburdening the infrastructure.

To accomplish this, Bryan-College Station CVB must revamp its marketing efforts by establishing a strong market positioning, providing a stronger visitor orientation, better facilitation of existing visitors, more focus on "extend the stay" efforts and a highly strategic direct sales matrix approach to niche markets. The CVB needs to provide leadership in the development of a new convention facility and other new products to continue driving longer visitor stays and higher interest, while maintaining the same level of satisfaction.

Tourism revenues in Bryan-College Station can grow to create stronger economic impact for the community with 1) a concentrated effort based on the clear positioning, 2) investment in strategically targeted marketing efforts and 3) focus on improved orientation and facilitation.